

SUMUS

CAPITAL

Private Banking & Family Office Services

Our Three Pillars

Transparency

- Client stewardship and **alignment with client's wishes** as top priorities
- **Clear segregation of roles** between Asset Manager and Custodian Bank
- **No inducements** nor retrocessions

Solidity

- **FINMA** Regulated
- **Strong capital base**
- Audited by **KPMG**
- **Schellenberg Wittmer** as legal counsel

Expertise

- Created by investment professionals who have been **working together** for over 15 years
- Experienced Asset Management team in Fixed Income, Equities and Commodities combined with senior Wealth Management professionals

Our Story

2015

- Sumus Capital was founded in Geneva as a **Family Office**, as a natural evolution of a trusted relationship between the founding families and the top managers, after years of valid and convincing portfolio management.

2016

- A few months after its foundation, Sumus Capital obtains **FINMA authorization** for the management of mutual funds and starts the **Asset Management** business.

2018

- Sumus Capital opens the Lugano office and, with the arrival of Paolo Anastasi, starts the **Private Banking** division.

2020

- After 4 years of profitable growth and with the aim of entering a new development phase, the members of the Executive Committee, through **management buy-out**, bring their shareholding to over 75% of the company's capital.

Our Knowledge

Team members combine several hundred years of experience in the financial industry. Each member's very own background and skillset blend together to represent a comprehensive and complementary wealth of knowledge, including:

Strategic Asset Allocation

Bond Management

Equity Management

Funds and Managers Selection

Wealth Management

Family Office

Our Strengths

- Soundness and solidity
- Built on core competences of our team
- Profitable since foundation

Our Approach

- Transparent fee structure
- Objectives in line with client's risk profile
- Remuneration based on performance
- Open architecture

Custodian Banks

As an independent and fully regulated asset manager we have established relationships with major financial institutions, including:



Advantages of Role Segregation

- Optimization of client-bank relationship
- Efficiency in fees and contractual clauses
- Ability to provide tailor-made services
- Mutual control between asset manager and custodian

Family Office Services

Wealth Planning

Wealth Management

Tax Planning

Trust & Corporate Services

Portfolio Consolidation

Family Governance

Charity & Philanthropy

Concierge Services

Asset Management

Our competences mainly reside in in-depth knowledge of strategic asset allocation, bonds, equities, commodities and fund/managers selection. For specific asset classes we also invest through ETFs or third party funds. We operate in **open architecture**, but we take the utmost care in the selection of third party products invested in our customers' portfolios. Investment in our own funds is limited and only takes place if it brings benefits to the client, like enhanced diversification or cost-effectiveness.

Our Team



Luca Parmeggiani
Chief Executive Officer



Andrea Zuccheri
Chief Investment Officer



Paolo Anastasi
Head of Private Banking



Valèria Baumann
Compliance Officer



Matteo Anrò
Senior Portfolio Manager



Joachim von Buchwald
Head of Private Banking Geneva



Martina Grattarola
Business Developer



Frédérique Dubrion
Senior Portfolio Manager



Stefano Maltese
Senior Private Banker



Danae Parés
Operations Geneva



Marcella Stoppa
Operations Lugano



Luigi Leone
Private Banker